



MD AOC Project

Introduction to PeopleSoft

PeopleSoft Inventory Session

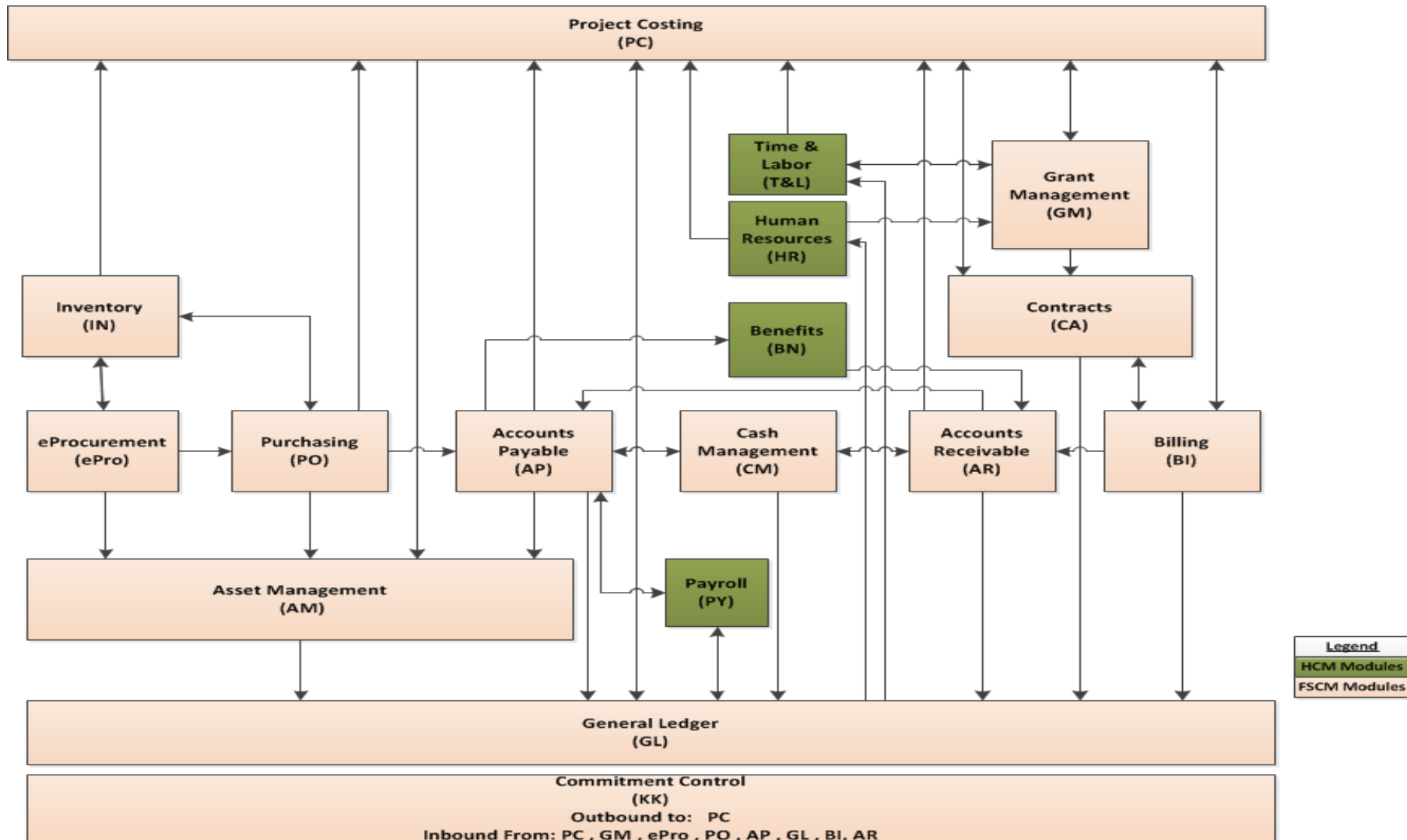


- **Introduction**
- **Session Objectives**
- **PeopleSoft Overview**
- **Key Features & Concepts**
- **Business Processes**
- **A Look at PeopleSoft 9.1**
- **Next Steps**
- **Questions**

- **Neil Shahi - Introduction**
 - **Seasoned professional with over 15 years of PeopleSoft architectural, functional, technical implementation experience with Supply Chain, Inventory functions.**
 - **Past projects**
 - **Public sector: WMATA, US Mint, IRS, FDIC.**
 - **Commercial: Oceaneering, Green Mountain Coffee, Drypers, Dynegy, Imperial Sugar, Marriott, NASD, T.Rowe Price, National Geographic, Qwest, Thales, Blackboard, Appian, Arbitron, World Bank, Fannie Mae, Freddie Mac, Conagra, Southwestern Bell, NYNEX, GTSI, Mantech, ...**

- Introduce you to PeopleSoft 9.1 Inventory
- How we achieve that:
 - Review Key PeopleSoft Features
 - Review Process Flows
 - Look at the Application

PeopleSoft Overview



PeopleSoft Overview

Record to Report (RTR)

General Ledger (GL)

- Subsystem Journals
- Monetary Journals

Commitment Control (KK)

- Pre-Encumbrance (Commitments)
- Encumbrance (Obligations)
- Expenses
- Recognized Revenue
- Budgetary Journals

Procure to Pay (PTP)

eProcurement (ePro)

- Self Service Requisitions
- Self Service Receipts

Purchasing (PO)

- Requisitions
- Purchase Orders
- Receipts
- Items
- Change Orders
- PCards

Accounts Payable (AP)

- Vendors
- Vouchers/Invoices
- Payments

Supply Chain Management (SCM)

Inventory (IN)

- Putaway
- Order Fulfillment
- Inventory Counts

Asset Lifecycle Management (ALM)

Asset Management (AM)

- Assets
- Depreciation
- Retirement

Enterprise Service Automation (ESA)

Grants Management (GM)

- Pre-Award (Proposal, Proposal Project, Budget Activity)
- Post-Award (Contract/Award, Project/Grant Activity)

Contracts (CA)

- Contracts
- Billing Plans
- Prepaids/Advances
- Revenue Plans

Project Costing (PC)

- Projects
- Assets

Order to Cash (OTC)

Billing (BI)

- Billing Data
- Invoicing

Accounts Receivable (AR)

- Customers
- Receivables
- Collections
- Payments
- Aging

Cash Management (CM)

- Banking Relationships
- Treasury Accounting
- Reconciliation

Human Capital Management (HCM)

Time and Labor (T&L)

- Time Entered
- Costs
- Team Members
- Status of Grants
- Chart of Accounts

Payroll (PY)

- Garnishment Invoices
- Tax Invoices
- Vendors
- Chart of Accounts
- Benefits Invoices

Human Resources (HR)

- Personal Information

Benefits (BN)

- Vendors
- Accounts Receivables

Key Features

- Item Management
- Inventory Control
- Cycle/physical counting
- Comprehensive costing
- Receiving/Putaway
- Material Issues
- Serial/Lot number tracking
- Replenishment

Inventory Overview

Putaway

Order Fulfillment

Replenish Stock

Returned Material
Authorization

Par Inventory

Consigned
Inventory

Storage and
Shipping
Containers

Vendor Managed
Inventory

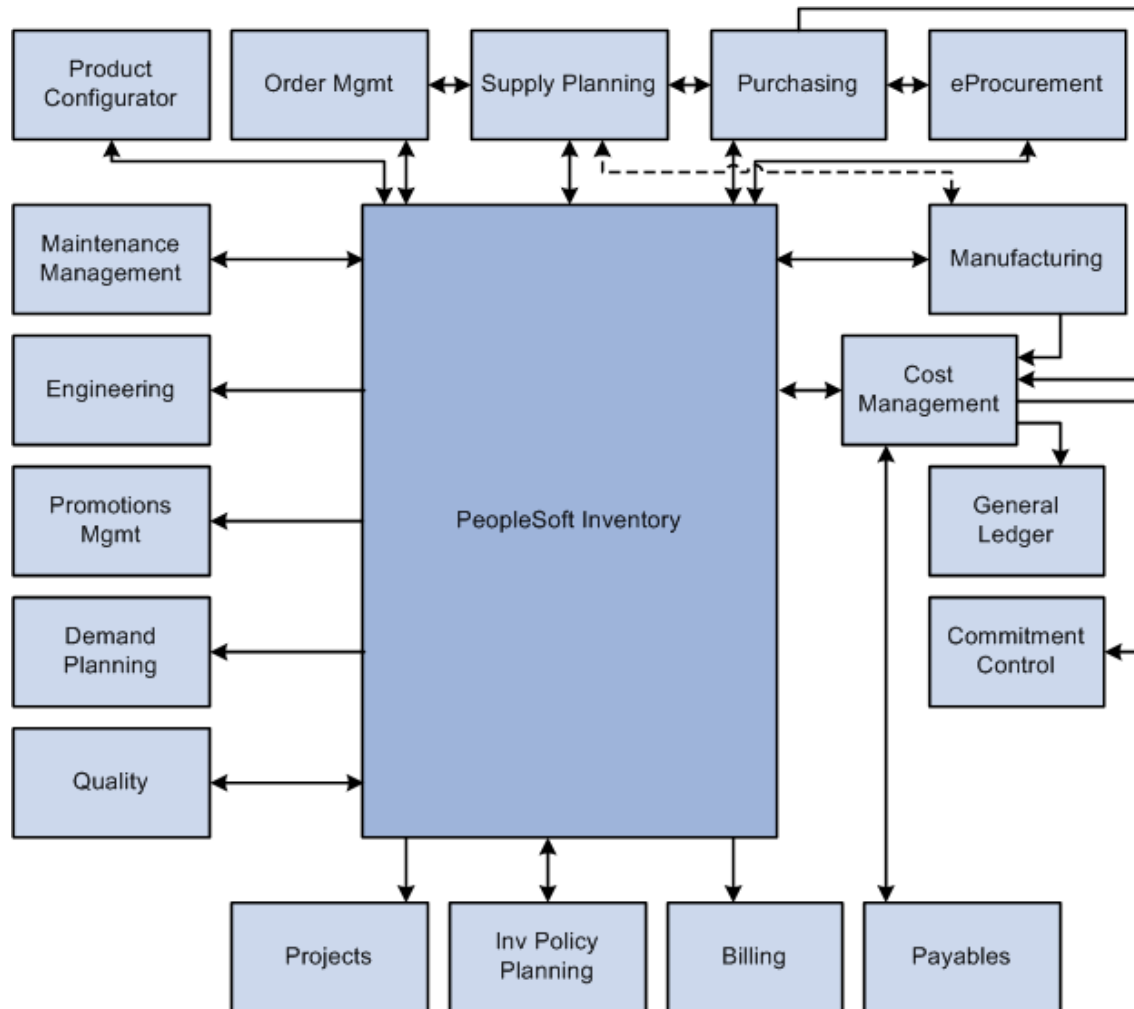
Material Usage and
Reconciliation

Inventory Counts

Adjustments and
Transfers

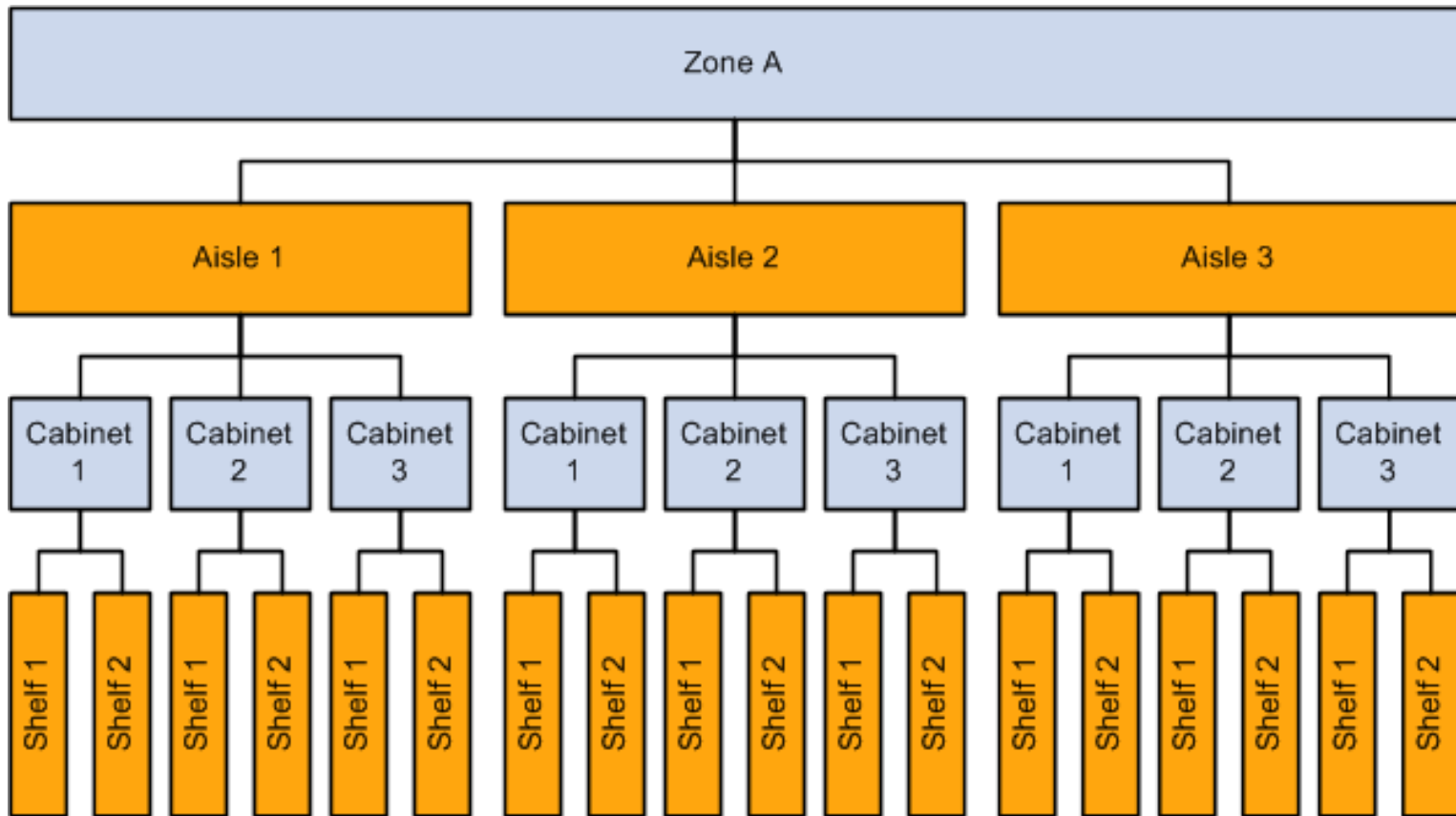
Order Pegging

Inventory Integrations



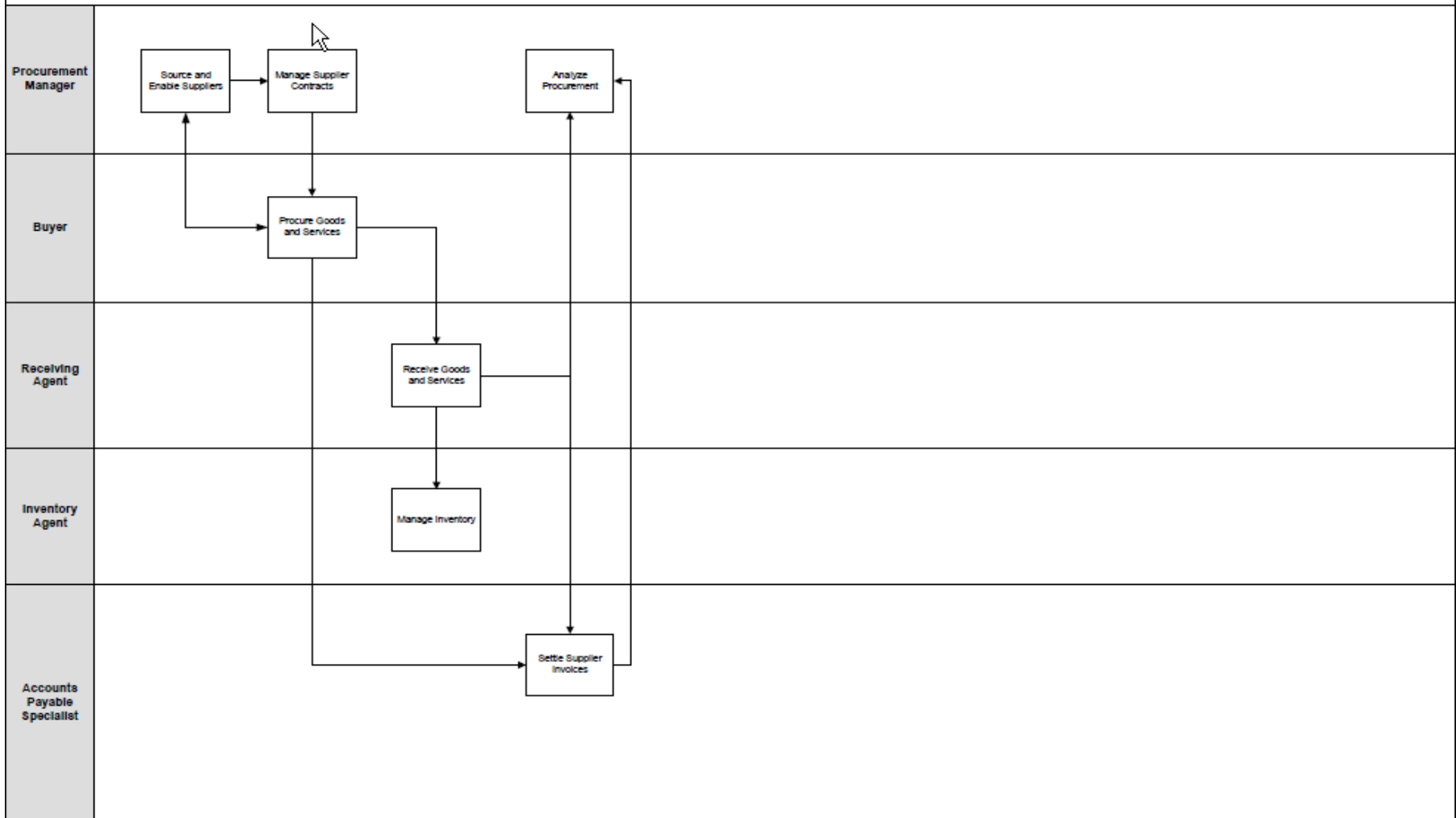
Key Features & Concepts (continued)

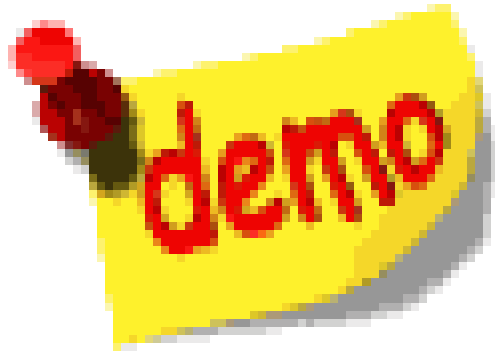
Inventory Bins



Business Processes – Procurement and Materials Management

PeopleSoft Enterprise *Procurement and Materials Management*





PeopleSoft 9.1 Inventory

- Items
- Item Balance
- Item Balance By All Units
- Transaction History

<http://oracle14.courts.state.md.us:10800/psp/fsdemo/?cmd=login>

A Look at the PeopleSoft 9.1 – Items

ORACLE

[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)

[Favorites](#) | [Main Menu](#) > [Items](#) > [Define Items and Attributes](#) > [Define Business Unit Item](#)

[New Window](#) | [Help](#) | [Customize Page](#) | [http](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Manufacturing](#) | [Planning](#) | [Configuration](#) | [Custom](#)

Shipping/Handling

[Replenishment](#)

[Weight/Volume](#)

[Utilization Types](#)

Unit: IN001 Item ID: INACM001 Standard Unit of Measure: EA
Wood Chisel 1/2"

Ship Via:

*Standard Pack Unit of Measure: EA

Stock Type:

InterUnit Par Qty:

UOM Conversion Flag: Use Entered UOM

Shelf Life (Days): 0

Inventory Attributes

- ☐ Staged Date Control ☐ Additional Handling
☐ Isolate Item ☐ Oversized Item

Lot Control

Availability Lead Time (Days): 0
Retest Lead Time (Days): 0

[Assign Item to Zones](#)

[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#)

[Add](#) | [Update/Display](#)

[General](#) | [Inventory](#) | [Substitutes](#) | [Manufacturing](#) | [Planning](#) | [Configuration](#) | [Custom](#)

A Look at the PeopleSoft 9.1 – Item Balance

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Review Inventory Balance Info > Item Balance by Location

New Window ? Help Customize Page http

Item Balance By Location

Unit: IN001

Item ID: INPFB001

Standard UOM: EA

Common Nail Hammer

Item Balance By Location										
Customize Find View All First 1-4 of 4 Last										
Area	Lev 1	Lev 2	Lev 3	Lev 4	Nettable	Qty Reserved	Qty Storage	UOM	Qty Reserved Base	Qty Storage Base
LOC1	1				Y	504.0000	-4.0000	EA	504.0000	-4.0000
LOC2	1	2			Y	4.0000	496.0000	EA	4.0000	496.0000
LOC3	1	2	3		Y	31.0000	69.0000	CS	496.0000	1104.0000
LOC3	1	2	3		Y	1712.0000	-1532.0000	EA	1712.0000	-1532.0000

Total in Storage Locations: 64.0000

Total Staged for Shipping: 0.0000

[Item Balance By Unit](#)

Return to Search

Notify

A Look at the PeopleSoft 9.1 – Item Balance By All Units

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Review Inventory Balance Info > Item Balance by All Units

New Window ? Help Customize Page http

Item Balance By All Units

Item ID: Search

Item Information

Find | View All | First 1 of 1 Last

Item ID: INPFB001
Description: Common Nail Hammer
Std UOM: EA SetID: SHARE

Business Unit Balances

Customize | Find | View All | First 1-2 of 2 Last

Unit	Qty Available	Qty Reserved	In-Transit Qty	Quantity On Hand
IN001	2080.0000	700.0000	0.0000	2780.0000
IN002	0.0000	0.0000	0.0000	0.0000

Total Qty Available:	2080.0000	Total Qty In-Transit:	0.0000
Total Qty Reserved:	700.0000	Total Qty OnHand:	2780.0000

Notify

A Look at the PeopleSoft 9.1 – Transaction History

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Inventory > Manage Inventory > Analyze Inventory > Review Transaction History

New Window ? Help Customize Page http

Review Transaction History

*Unit: US008

*Sort By: Date

Search

Item ID: LT5010

Custom Road Bicycle

22

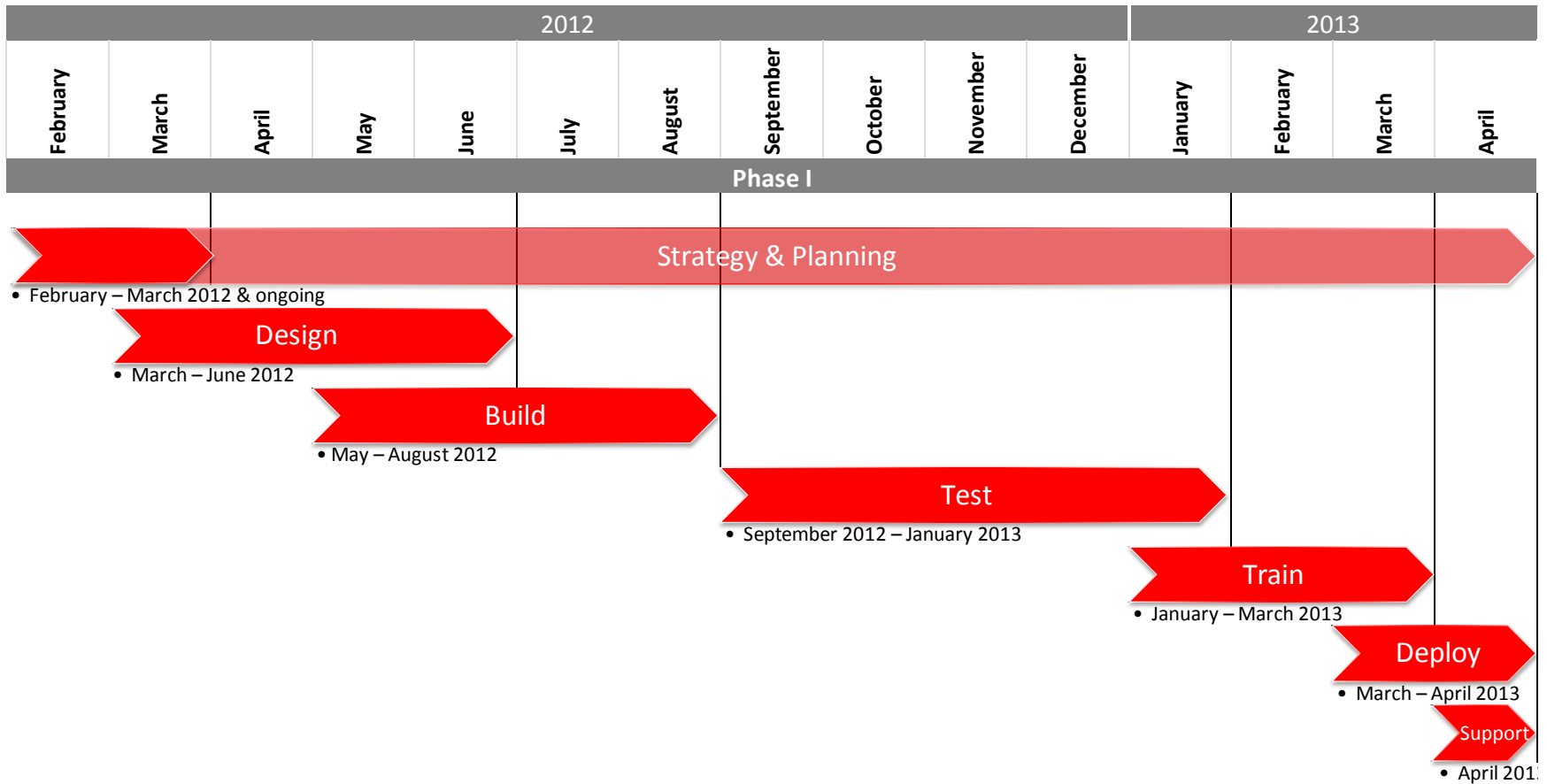
Transaction History

Find | View All First 1-3 of 3 Last

Date Timestamp	Tran Group	Base Qty	Onhand Qty	Order	Recv ID
08/16/2000 10:47AM	030-Depletions	-3	95	CEN0026	
08/16/2000 10:47AM	030-Depletions	-2	98	CEN0026	
08/07/2000 3:37PM	020-Putaway	100	100		RCV00221

Notify

Next Steps



Questions

